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Designing Your Family Planning Education Program

U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES
Public Health Service
Health Services Administration
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Designing Your Family Planning Education Program

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Contents

	Page
ACKNOWLEDGMENTS	ii
INTRODUCTION	1
I. HOW TO PLAN AND EVALUATE YOUR PROGRAM	3
Define the Problem	3
What Is a Problem?	4
How Do I Identify the Problem?	5
How Can I Document the Problem?	6
How Do I Make a Formal Statement of the Problem?	7
Set the Objective	8
What Is an Objective?	9
How Do I Set the Objective?	9
How Do I Measure the Objective?	10
Select a Strategy	11
What Is a Strategy?	12
How Do I Develop Strategies?	12
How Can I Select the Best Strategy?	13
Identify Resources	14
What Are Resources?	14
How Do I Identify the Required Resources?	15
Develop an Action Plan	16
What Is an Action Plan?	16
How Do I Identify the Tasks?	17
Design the Program Evaluation	20
What Is Evaluation?	20
Is Evaluation Always the Same Process?	21
What Does Evaluation Measure?	22
How Do I Obtain Information for the Measures?	23
Who Collects and Analyzes the Evaluation Data?	24

		Page
II.	CLIENT EDUCATION	27
	Which Kind of Program Is Best for My Agency	27
	How Do I Set the Program Objective?	32
	How Do I Select the Best Strategy?	33
	How Can I Develop My Program's Resources?	36
	What Must Be Done to Carry Out the Plan?	40
	How Do I Evaluate My Agency's Education Program?	40
III.	COMMUNITY EDUCATION	45
	What Kind of Program Should I Plan?	45
	How Is the Program Objective Set?	51
	What Are Some Community Education Strategies?	52
	How Can I Develop Resources?	55
	How Do I Plan to Carry Out the Chosen Strategy?	57
	How Do I Evaluate the Program?	58
IV.	STAFF DEVELOPMENT	65
	What Is Staff Development?	65
	Who Needs Staff Development?	65
	What Kinds of Staff Development Are Needed?	66
	How Do I Set the Staff Development Objective?	69
	What Kinds of Staff Development Programs Are There?	70
	What Resources are Needed for Staff Development?	72
	Who Provides the Instruction?	73
	How Do I Develop an Action Plan?	73
	Why Evaluate?	74
	How Do I Evaluate Staff Development?	75
V.	EDUCATIONAL MATERIALS	77
	How Can I Identify What Kinds of Materials Are Needed?	77
	Why Set An Objective for Materials?	80
	How Can I Develop and Use Materials?	81
	How Can I Obtain the Necessary Resources?	84
	How Will an Action Plan Summary Help?	85
	How Do I Evaluate the Educational Materials?	86
PLANNING CHECKLIST		89

Introduction

Designing Your Family Planning Education Program is a guide to planning. It is written for people who are interested in developing a plan to design a new education service or improve the quality of an existing one. By applying the planning concepts and suggestions contained in this guidebook, you will be able to identify what your education program needs to accomplish in order to serve the interests of your clients and community well. Use of these concepts will also help you plan a program that will overcome many of the problems which have plagued health education programs in the past, such as lack of trained staff, time, space and money.

The book is written in a practical "how to" fashion which guides you through the planning process step-by-step: defining the problem, setting the objective, selecting a strategy, identifying resources, developing an action plan, and designing the evaluation. As you will learn, these steps in program planning form a continual process of asking and re-asking the following questions:

- What do I have to consider to set up or improve a family planning education program?
- What steps do I need to take?
- What will be accomplished?
- How do I measure the accomplishments?
- What will the measurements tell me?
- How can I use this information?

By learning which questions to ask and how to get the answers, you will become equipped to solve day-to-day problems confronting your education program. You will also be able to develop long-range plans, write a grant application for outside funding, and justify an education budget increase to your agency director. In other words, planning is not just theory put on paper--it has numerous and diverse applications for solving the problems encountered by your agency.

Since the planning process tends to be orderly and analytical, we have tried to make it come alive for you by illustrating how the concepts can be used to design a family planning education program. The guidebook is organized into five chapters. The first chapter describes the basic concepts of planning and evaluation which can be applied to any agency, regardless of its size and composition. Each subsequent chapter then presents practical suggestions on how to plan different

parts of your agency program. Chapter II is dedicated to the client education program. Chapter III discusses the planning considerations for community education. Information on how to plan and evaluate an in-service staff development program is presented in Chapter IV. The fifth chapter describes ways you can plan to select and develop educational materials to support your program efforts. A sixth section of the guidebook offers a brief summary of the major planning concepts to remember.

Although the guidebook cannot deal with the various situations that are unique to every family planning program, it is specific enough to provide you with a general framework for developing an education plan. If this guidebook makes your planning tasks easier, then it has served its purpose.

I. How to Plan and Evaluate Your Program

People often shudder when they hear the words "planning" and "evaluation." Visions of esoteric concepts and even more incomprehensible statistics immediately leap to mind. Actually, planning and evaluation need not be complex. A practical, realistic approach makes the best plan, and this is the kind of approach introduced in Chapter I.

This chapter will help you work through the planning process step-by-step. Concepts and principles are presented along the way which have broad application for almost any planning situation in a family planning service setting. In subsequent chapters, we will offer specific suggestions for applying these ideas to the needs of your agency.

Don't be discouraged if you don't grasp the concepts immediately. Sometimes the logic of planning seems to make no sense at all when you are busy trying to cope with the demands of day-to-day agency life. Once you've learned the steps in planning, you will be able to design problem-solving strategies to help your program meet the demands and operate more effectively.

Step 1: Define the Problem*

Planning is your blueprint for action--it tells you where you should be going. The first step of planning is to "know thy problem." By becoming aware of the problems affecting your program, and also those that your program can tackle, you become able to do two important things:

- First of all, you can tailor your plan to what needs to be done.
- Second, you can justify your plan to those who might help you put it into action.

* The planning steps were adapted in part from Hip Pocket Guide to Planning and Evaluation by Dorothy P. Craig, Copyright©1978. Published by Learning Concepts, Austin, Texas. Used with permission.

WHAT IS A PROBLEM?

There are many definitions of what a problem is. This is the one we think can help you develop your plan.

> A problem is . . .
>
> a situation that you and others consider undesirable, that affects someone or something, and that will continue to exist if nothing is done.

A problem is a situation that . . .

- you and others consider undesirable.

  It may be something that has a bad consequence, such as women having unplanned pregnancies.

  It may be a situation where things are just not as good as you would like. For example, agency staff members who are interested in improving their skills may not have access to staff development opportunities.

- affects someone or something.

  A problem isn't a problem unless it has an impact. It could affect your clients, your staff, your education or agency program. It could also affect members of your community. As a planner, you have to know who and what are affected by the problem.

- will continue to exist if nothing is done.

  You are not going to want to spend the time, energy and money to develop a plan for solving a problem unless you are reasonably sure that it will not go away on its own. Ask yourself, "What will happen if nothing is done?" Will the problem continue? Will it get worse? If so, then your plan is justified.

Your plan can solve many kinds of problems; these may be in the community, the agency, or in your own family planning education program. The problem may affect others, such as:

- Your agency has a problem with clients not returning for their scheduled appointments.

The problem may affect your own education program, such as:

- The local school board has banned all discussion about contraception in public school classrooms, so your community educators can no longer make presentations in the schools.

The problem may be caused by your own education program, such as:

- The Spanish-speaking clients are not able to give informed consent because all of the materials are in English and no one on the staff speaks Spanish.

The type of problem you define will determine the type of plan you develop. For example, a community education program which is planned around combating teenage pregnancy will probably be quite different from an agency program planned around improving clients' knowledge about contraception. It is up to you to identify which problems need to be tackled by your plan.

HOW DO I IDENTIFY THE PROBLEM?

The goal of your family planning education program is to meet the needs of your staff, clients, and community. Therefore, you must ask them what problems need to be solved, or at least alleviated, for your program to serve them well. Don't try to identify the problems on your own; what you consider an undesirable situation may not be viewed the same way by others.

When you ask others to help you identify problems, be sure to have a framework prepared for making your request easy to understand. Use intriguing questions to get everyone's thoughts on track, and employ examples of the kinds of problems that might exist.

Here are some ways that you can involve others in identifying the problems:

Ask your agency staff to identify problems. Getting feedback from personnel who have different responsibilities will give you several perspectives on what the problems are. Also, by involving the staff in program planning, you can build a cooperative effort which will be valuable when the time comes for the education plan to be approved and carried out. You may find that some staff members would be willing to be a part of your planning team; together the team can poll others to identify problems.

Ask your clients what problems should be tackled by your family planning education program. You can spend a day, a week, or even a month gathering information from your clients. The more feedback you get, the better.

Ask members of the community. The important issues are more likely to become apparent if you communicate with people representing a variety of interests, such as: potential clients, health and social service workers, community leaders, educators.

By the time you have finished communicating with all of these people, you will probably have a long list of problems. You and your planning team can organize the list in order of priority: which problems are most relevant to the goals of your agency? Which are so crucial that they were cited over and over by everyone? Once the problems are grouped like this, it will be easier to determine which problem should be addressed by your program.

HOW CAN I DOCUMENT THE PROBLEM?

Numbers can tell you a great deal about problems. You can find the numbers you need by looking at information collected by community agencies, including your own. There are several ways numbers can be used to document the fact that a perceived problem actually exists:

- Numbers can demonstrate the existence and size of the problem. For example: In 1979, 500 cases of VD were reported to the local health department, which was a 20% increase over the previous year.

- Numbers can show the consequences of the problem. For example: In 1979, 30% of the births by teenage mothers were premature, which was an increase of 10% over the previous year.

- Numbers can show how many people share the perception of a situation as a problem. For example: Eight out of ten agency staff members cited "clients' misinformation about contraceptive methods" as the major problem to be addressed by the education program.

You can see from these examples that community and agency data can reveal quite a bit about a problem. Later chapters of this guidebook will offer some practical suggestions on where to find the numbers you need and how to use them.

HOW DO I MAKE A FORMAL STATEMENT OF THE PROBLEM?

After you have identified and documented the problem you want your education program to address, it becomes time to state the problem in formal terms. This consists of looking at the problem from your program's viewpoint. The formal statement reveals what your education program is not doing to reduce or solve the problem.

The following five basic elements should be contained in your formal statement:

WHEN:	Period of time that the ongoing problem has existed.
WHERE:	Geographic location or organization that the problem affects.
WHAT:	Nature of the problem.
WHO:	Characteristics of the people affected by the problem.
HOW MUCH:	Size of the problem.

Here is an example of how a family planning educator could write a formal statement of a problem within the agency:

The agency staff and community representatives have identified "an increasing client dropout rate" as the major problem that your education program needs to address. Agency data have indicated that this problem is not going to go away on its own: there has been a steady increase over the past three years in the number of clients dropping out of the family planning program. The agency data have shown further that most of the dropouts are Spanish-speaking clients, and 80% of the Spanish-speaking clients drop out of the program within one year. The educator has asked the staff and representatives of the Spanish-speaking community to help determine why the education program is not addressing the dropout problem. Their answer: the program educates all new clients as a group--there are no specific educational services for the Spanish-speaking clients.

Therefore, the formal statement of the problem would be:

WHEN:	For the past three years (dates)
WHERE:	the family planning education program (name)
WHAT:	has not addressed the increasing problem of client dropouts, to the point where now (date),
WHO:	the Spanish-speaking clients' dropout rate is
HOW MUCH:	80%.

Step 2: Set the Objective

So you have taken your first step; you have identified a problem and you know what your education program has <u>not</u> been doing to solve it. The second step of the planning process is to state precisely what your planned program <u>will</u> accomplish to reduce or eliminate the problem. This is commonly called "setting the objective."

WHAT IS AN OBJECTIVE?

Your education program objective must be a specific, measurable statement of what you intend to accomplish by a certain time. It contains the same elements that you included in your formal statement of the problem. The formal statement of the problem defines the situation of your education program in negative terms, whereas your objective states it in positive terms. With this in mind, here's our definition:

> An objective is . . .
>
> a situation that is considered desirable, affects people or your program, and will exist in the future.

HOW DO I SET THE OBJECTIVE?

The program objective can be set by translating the problem statement into a positive declarative sentence, in which you state precisely what will be accomplished, when the end result is expected, where the accomplishments will occur, who will benefit and in what way, and how much needs to be achieved to reduce or eliminate the problem. Since problems can rarely be eliminated completely, though, the "how much" part of the objective statement is usually smaller than the one contained in the problem statement. Therefore, the objective rarely states that the program results will totally eradicate the problem. Our best advice for determining "how much" is to BE REALISTIC about what your education program can and cannot do. This doesn't mean you should hesitate to tackle big problems. Just make sure that you and your staff consider the objective attainable.

Here is an example illustrating the difference between problems and objectives: the problem may be that 80% of the Spanish-speaking clients drop out of the program within one year. A realistic objective may be to reduce their dropout rate to 40%.

Using the above example, the statement of the objective could be written as follows:

Sample Objective

WHEN: By January 1 of this year (i.e., one year from now)

WHERE: our family planning education program

WHAT: will have services

WHO: for Spanish-speaking clients

HOW MUCH: that will reduce their dropout rate from 80% to 40%.

You would not know as much if you had written the objective in the following incorrect way:

"Our objective is to reduce the dropout rate."

First of all, what is the date when you expect the objective to be reached? Then too, what is the desired future state of the program? Whose dropout rate is it? Who is the targeted group? Finally, how would you know when you have reached the objective? There are too many questions left unanswered in this statement of the objective.

HOW DO I MEASURE THE OBJECTIVE?

When you write your program objective, it is essential that you include a way to measure whether the objective has been achieved. Be specific in what you propose to accomplish and who will be affected. In addition, include numbers whenever possible. For example:

don't say "clients"	SAY "new clients who have never practiced contraception."
don't say "materials"	SAY "one film on the pelvic exam and 500 pamphlets on VD"
don't say "recruit more clients"	SAY "recruit 20% more new clients through community education than the 100 who were recruited this way last year."

The "how much" part of your problem and objective can be difficult to determine, especially since family planning education deals with how people think and behave. There is no simple, precise method for measuring human behavior outside of an experimental laboratory. You can find a way instead to hint indirectly at what you want to know. An indirect measure is known as an "indicator." For example:

If you say "help new clients become knowledgeable about their selected method"	THEN SAY "the indicator for knowledge is: the number of new clients who can state at least four basic facts about their selected method at the exit interview."
If you say "teach all clients to practice contraception effectively"	THEN SAY "the indicator for effective practice is: the number of clients who did not become pregnant after they had selected a method."
If you say "help all clients feel satisfied with the agency program"	THEN SAY "the indicator for clients' satisfaction is: the number who make return visits to the agency."

We hope the message is clear: once you've defined the way(s) in which you will measure the outcome of the objective, you must stick to it. It's cheating to decide later that it was a bad measure if it points to failure, so be careful and precise.

Step 3: Select a Strategy

Now that you have defined the problem and set the objective, you should settle down and figure out how to solve the problem. Step 3 of planning involves identifying, analyzing, and choosing the best general strategy that will help you arrive at the objective.

WHAT IS A STRATEGY?

> **A strategy is . . .**
>
> **a series of activities that are carried out by members of your education program to reach the objective.**

First, come up with as many ways as you can to solve or reduce the problem. The more ideas you have, the better your chances of selecting a strategy that will work.

HOW DO I DEVELOP STRATEGIES?

The more people you involve, the better. One of the quickest, easiest ways to generate ideas is to hold a brainstorming session with staff members, where you ask them to think up as many strategies as possible for reaching the objective. (Don't criticize any ideas at this point—it might inhibit creativity.) By the end of the brainstorming session, you should have a sizeable list of options for attacking the problem and reaching your objective.

An example of an objective and a list of possible strategies are shown as follows:

> **Sample Objective**
>
> One year from now, our program will have family planning education services for Spanish-speaking clients that will reduce their dropout rate from 80% to 40%.

Sample Strategies

- Have appropriate educational materials available for Spanish-speaking clients.

- Instruct current staff members on how to meet the needs of the target population.
- Hire a Spanish-speaking educator to attend to the needs of these clients.
- Conduct a community education program for the Spanish-speaking population.
- Establish a telephone "hotline" using Spanish-speaking volunteers.

HOW CAN I SELECT THE BEST STRATEGY?

You now have a long list of strategies. It is often possible to combine several ideas into one strategy, but in any case, you must view each one from different angles to see how workable it would be. Here is an example of how you can analyze the favorable and unfavorable forces influencing a single strategy.

Strategy

Hire a Spanish-speaking educator to develop, conduct and evaluate a new education program.

Favorable Forces		Unfavorable Forces
Spanish-speaking clients may be less likely to drop out because of the special attention.	←------→	The program does not meet the needs of other clients who have dropped out.
Other educators will have more time to dedicate to the other clients.	←------→	The Spanish-speaking educator may have too many clients to handle.
The educator can develop materials for Spanish-speaking clients.	←------→	The budget for educational materials is limited.
The agency administrator is in favor of the program.	←------→	The agency board is against the program.

Looking at the forces that can help or prevent your strategies from working, answer the following questions:

- Can the forces supporting the strategy be strengthened?
- Can the unfavorable forces acting against the strategy be reversed or disregarded?
- Can your agency find new support to help carry out the strategy?

After you have analyzed all of these factors, you will have a much better idea of which strategies are the most feasible.

Step 4: Identify Resources

At this point, you will know where your education program needs to go to solve or alleviate a problem (Step 1); when you'll arrive and what you will have accomplished (Step 2); and even what the best "means of transportation" is (Step 3). Now you have to figure out where to get the gas! This step in planning is known as "resource identification."

WHAT ARE RESOURCES?

When you plan and evaluate your education program, keep the following definition in mind:

> **Resources are . . .**
>
> both tangible and intangible things used by people for carrying out a strategy in order to reach an objective.

Here are some examples of the types of resources that are necessary for family planning education programs:

- Money--How much money is needed to carry out your education plan? Is there enough already in the budget? If not, can money be reallocated to the program from other budget items, or can it be acquired elsewhere?

- People--How many people are required to carry out your strategy? Are they currently available? If not, can you find more people elsewhere?

- Facilities--How much and what kind of space is required for the program? Do you have the space? If not, can you get it?

- Materials--What kind of educational materials do you need to reach the objective? Do you currently have enough of the right type? If not, can you develop them at the agency or acquire them from somewhere else?

- Equipment--What kinds of equipment do you need to conduct the education program? Do they exist and are they available? If not, can you acquire or develop them?

- Time--How much time is required to develop and implement your program strategy? Do you already have enough time allocated to your program for conducting the planned activities? If not, can you make the time?

- Knowledge--What kind of knowledge is needed to reach the objective? Do the people who will be implementing the plan already possess this knowledge? If not, can they acquire the knowledge, or can you find a knowledgeable person outside your program to help?

- Skills--What skills or practical abilities are necessary? Do the people who will be involved in the program have the necessary skills? If not, can they develop or acquire them elsewhere?

HOW DO I IDENTIFY THE REQUIRED RESOURCES?

Look at your objective and chosen strategy to see what resources are required. You and the other people involved in planning the education program must find answers to the following interrelated questions:

- What types of resources are required?

- What resources do you already have?
- What resources do you need to acquire or develop?

You may discover that your program is able to acquire all of the resources necessary to carry out the plan. If so, you are in fine shape to go on to the next planning step. Some planners find at this stage that the required resources are not available, however--it seems as though they have reached a dead end. If this happens to you, it doesn't mean that your planning should stop; it just means that you must go back and re-assess the previous planning steps. By re-thinking and adjusting the problem, objective, and strategy, you might be able to come up with the resources you need. Then you can move on to Step 5 of developing the education plan.

Step 5: Develop an Action Plan

Most people, not just planners, are already aware of the considerations in this planning step: who is going to do what, on what days, and with what resources. More than any other step, developing an action plan is a good test of whether you did your homework during the previous steps.

WHAT IS AN ACTION PLAN?

This is the point where your plan becomes very real. It is time to determine and assign tasks, develop schedules, and calculate your use of resources. The result is a plan of action you will use to carry out the strategy. With this in mind, our formal definition of such a plan is that:

> An action plan is . . .
>
> a summary of the tasks that must be done by certain people, by specific deadlines, using a designated amount of resources, in order to carry out the strategy.

HOW DO I IDENTIFY THE TASKS?

First of all, gather your planning group to help outline the tasks and to answer the following questions:

- What must be done?
- In what order should the tasks occur?
- When should the work be completed?

Here is an illustration of how an action plan can be developed from a strategy:

> **Strategy**
>
> Hire a Spanish-speaking educator to develop, conduct and evaluate an education program for Spanish-speaking clients.

In looking at the sample strategy, four necessary tasks come to mind right away. First, the educator must be hired. Then, the educator has to develop and conduct the program. Finally, the program must be evaluated. Isolating these major tasks helps reveal other work that must be done, for example: advertise the job opening, interview and screen applicants, etc. Eventually, a realistic list of tasks will be developed for working toward the objective.

After the tasks have been identified, you must decide:

- which staff members should be responsible for doing each task
- when the work will begin
- when it will be completed
- what kinds and how many resources will be used.

To make these decisions, first estimate how much time will be required to complete each task. Then determine the staff costs by multiplying the time for each task by each person's hourly wage. (If the staff person has an annual salary, you can determine the hourly rate

by dividing the salary by 2,080 hours; for example, $15,000 per year divided by 2,080 hours = $7.21 per hour). The costs for other resources required for each task should also be noted, such as: one film = $300.

Luckily, there are ways that you can develop and summarize all of your action plan in one place, as shown by the table on the following page. Here is a categorical breakdown of the table:

Column A: lists each task involved in carrying out the strategy.

Column B: shows the time when each person's task begins and ends. You can determine the specific dates on this timetable by starting with the latest date each task should be completed. The start-up time is derived by estimating the amount of time necessary to complete the task, allowing some time for delay.

Column C: indicates the title of the assigned staff person(s).

Column D: details or at least estimates the time and cost spent for each person, plus any other tangible resources required, and their costs.

Column E: lists the total costs in time and money for each task, and also the grand totals for the entire program. The grand totals tell you exactly how much time and money should be included in your budget.

Summarizing your action plan in this kind of table is very useful in figuring out what tasks must be done, and whether the tasks you've outlined are realistic in terms of staff, time and resources. Moreover, the timetable of tasks is useful as both a planning tool and a management device for monitoring the program. By reading down the table, you can determine which activities should be occurring during a particular time, who is responsible for each task, and what the end result will be.

Knowing the total costs planned for each task and for the entire program will help you justify having the staff time and costs included in the education budget. (This, of course, is precisely the kind of information the people holding the purse strings want to know.) Your action plan table will also be very useful when the time comes to evaluate your program, which is the sixth and final step of planning.

ACTION PLAN TABLE

STRATEGY: HIRE SPANISH-SPEAKING EDUCATOR TO DEVELOP, IMPLEMENT AND EVALUATE CLIENT PROGRAM

A. TASKS	B. MONTHS 1	2	3	4	5	6	7	8	9	10	11	12	C. WHO	D. RESOURCES	E. TOTAL COSTS Time	Money
1. Advertise job position	—												Clerk	3 hrs. @ $3.50 per hr. newspaper ad @ $10.00	3 hours	$ 20.50
2. Screen applicants & hire educator	—	—											Director	5 hrs. @ $12.00 per hr. telephone, private room	5 hours	$ 60.00
3. Orient educator to clinic procedures			—										Clinic M.D. Nurse Director Educator	½ hr. @ $30.00 per hr. 1 hr. @ $8.00 per hr. 1 hr. @ $12.00 per hr. 2½ hrs. @ $8.00 per hr.	5 hours	$ 55.00
4. Develop educational materials for Spanish-speaking clients			—	—	—								Educator	10 hrs. @ $8.00 per hr. 1 film @ $300.00 500 brochures @ $50.00	10 hours	$ 430.00
5. Develop test of clients' knowledge				—									Educator Consultant	12 hrs. @ $8.00 per hr. 8 hrs., no cost	20 hours	$ 96.00
6. Conduct educational sessions				—	—	—	—	—	—	—	—	—	Educator	96 hrs. @ $8.00 per hr. (3 hours per week) waiting room private room	96 hours	$ 768.00
7. Conduct client testing					—	—	—	—	—	—	—	—	Educator	16 hrs. @ $8.00 per hr. 500 questionnaires @ $25	16 hours	$ 153.00
8. Record data					—	—	—	—	—	—	—	—	Clerk	8 hrs. @ $3.50 per hr.	8 hours	$ 28.00
9. Monitor program					•	•	•	•	•	•	•	•	Education Supervisor	4.5 hrs. @ $10.00 per hr.	4.5 hours	$ 45.00
10. Evaluate program												—	Director Supervisor Educator	2 hrs. @ $12.00 per hr. 2 hrs. @ $10.00 per hr. 10 hrs. @ $8.00 per hr.	14 hours	$ 124.00
GRAND TOTAL															181.5 hours	$ 1,779.50

KEY: • separate activity
— often-repeated activity

Step 6: Design the Program Evaluation

At last you are at the final step in planning an education program. Actually, a lot of the work you have done in the previous planning steps will help you complete this one. Step 6 requires you to develop ways for evaluating (or measuring the success of) your program efforts. The evaluation techniques we describe will help you improve your program based on its past performance, and also help you judge how well your plan is working. When you know how well the program is doing and why, you can then make the best use of resources and attack problems with renewed vigor.

WHAT IS EVALUATION?

Evaluation means many different things to people, but here's a definition we think will help you:

> Evaluation is . . .
>
> a system that provides information for making judgments and decisions about your actual results by comparing them to either your planned or past results.

This definition has several key terms that are worth examining:

Evaluation is ...

- a system that provides information.

  This means that evaluation is planned; it is not a random activity or an isolated event. It should be continuous and should consist of orderly and well-thought-out steps.

- a system for making judgments.

  Evaluation does not take place unless you can judge whether the program efforts and results have been successful or unsuccessful.

- a system for making decisions.

Once you make a judgment, then you must decide what to do about the program. Do the results show that your planned efforts should continue, be modified, or dropped altogether? Evaluation linked to decisions leads to action.

IS EVALUATION ALWAYS THE SAME PROCESS?

Actually, evaluation comes in two forms, both of which you will use: monitoring and assessment.

Program Monitoring

This form of evaluation helps you answer: "How well are we doing?" The monitoring process requires that you look at your actual ongoing performance versus the one you planned. The action plan table developed in Step 5 is a useful standard with which to compare your actual performance. Frequent monitoring (through meetings, observation, written reports and record review) will help you make an early detection of the existing or potential problems that might impede progress. Changes or adjustments can then be made in your tasks or resources before the problems become major.

Program Assessment

The second form of evaluation is one you use to assess the program's accomplishments. It tells you the answer to: "How well have we done?" and it takes place toward the end of the time limit set by your objective. Assessment of the success of the program's efforts is done by comparing the actual results to some standard.

One of the easiest standards to use for comparison is to look at what you planned. For example, comparing your actual program results to your original objective will tell you how successful the program has been.

Another useful standard is the problem situation that existed before you implemented the plan. If the actual results of the education program created a better situation than that which existed before, then you have good reason to judge the program successful. If you find the contrary, well...at least you've identified a problem, so you can go back to Step 1 again!

WHAT DOES EVALUATION MEASURE?

Your evaluation will measure two main aspects of the program: its effectiveness and its efficiency. You've probably heard these terms before; funding sources almost always require that these two measures be used in evaluation. As usual, there are many definitions of these terms. Here are the ones we like:

> Effectiveness is . . .
>
> a measure of the extent to which the actual use of resources, carrying out tasks and strategies, and meeting of the objective occurred as planned.

Your evaluation will always measure program effectiveness, because this measure tells you how successful your program efforts have been in reaching the objective. You can also compare the actual results to your program's past efforts to determine whether the original problem has been solved or alleviated. For example, a decrease in the number of client dropouts might indicate improved family planning education services.

> Efficiency is . . .
>
> a measure of the cost of resources (in time, money and number of people) used to carry out the plan, in comparison to the actual results (or benefits).

This measure will help you judge whether the results were worth the time, money, and effort by comparing the actual costs and results to those which were planned. For example, if the costs of conducting a separate education program for Spanish-speaking clients were the same or less than you had planned, and the number of clients actually served was the same or higher, then the program would be considered efficient. If the actual costs were more than planned, and the number of clients served was either the same or less, then it would have been an inefficient program.

Usually, you measure program efficiency only if you have already judged your program to be effective. If your program was unsuccessful, then it doesn't matter if it was efficient. For example, if you planned to decrease the client dropout rate from 80% to 40%, and the dropout rate actually increased to 85%, then it doesn't matter if the actual program costs were dramatically less than planned.

In following the previous planning steps carefully, you have already developed ways to measure the results of your program (its effectiveness) and how much it cost to obtain these results (its efficiency). You can probably see now why we insisted that you state in your objective precisely how much you expect your program to accomplish. In writing the objective, you have already developed measures and/or indicators to evaluate the results of your plan.

HOW DO I OBTAIN INFORMATION FOR THE MEASURES?

Once you know what measures you will use to evaluate the program's effectiveness and efficiency, you must then think about how to obtain the information you need. For example, a measure of program efficiency might be: "the number of staff hours spent conducting private education sessions;" the data for the measure would be: "500 staff hours were spent conducting 500 private sessions." Answers to the following questions will help you get the necessary data:

- What kind of information (data) do I need to measure effectiveness and efficiency?
- What kinds of data are already available?
- What data will have to be collected?
- How will the data be collected?

Use Available Data

Keep the data collection process as simple as possible. No one in your agency--clients or staff--wants to fill out another form. So, priority number one is to use available data if you can.

As you well know, the clients already give you a lot of information, most of which is contained in their client visit records. The agency reports a good deal of this information, as well as financial data, to your funding source every month. These reports contain such useful data for measuring effectiveness and efficiency as:

- number of clients served
- types of services provided
- specific characteristics of individuals (age, sex, socio-economic class) for whom services were provided
- expenditures
- cost of providing services
- agency income.

These reports should now include information on your education service. According to the January 1, 1980 instruction manual for the BCHS Common Reporting Requirements (BCRR), your agency director must report the number of staff and volunteer personnel working in agency education/social services and community services and their number of encounters with clients (on-site) and potential clients (off-site). Look for this information in your agency records. Other useful, available data can be found in your program's grant applications, financial records, and staff time sheets.

Collect New Data

If you are not able to get all the information you need from existing data, make sure that the methods you devise to collect new data are simple and quick. Questionnaires and interviews don't have to be long to get the information you need. Staff monitoring of your agency and community education sessions can be conducted once a month or four times a year, rather than every session. Just make sure when developing an evaluation plan that you describe precisely what data sources will be used and how you will collect the data.

WHO COLLECTS AND ANALYZES THE EVALUATION DATA?

You need to decide who will be responsible for data collection and evaluation. Here is some advice:

- Assign one person for overall supervision and coordination of the evaluation procedures.

- Involve the people who are already responsible for collecting and filing the available data you will use. Seek their advice and cooperation in helping you extract and record the data you need.

- Work directly with your agency director in developing a system that will allow you to have access to the pertinent financial, client, and staff data which are reported to others (for example, BCHS, the board of directors, other funding sources).

Keep in mind that it takes resources to develop and implement your evaluation plan. Make sure that your action plan includes: the schedule for evaluation; the persons assigned for each task; and the amount and cost in time and money of the required resources. These kinds of information will help you monitor your efforts and get the costs included in the education budget items.

With the evaluation process worked out, your entire plan is now complete. Just think how good you'll feel when your plan is approved and put into action, and you find that everything is running smoothly on schedule, because you thought out everything in advance. It's worth the effort, isn't it?

NOTES

II. Client Education

As the starting point of your family planning education program, the agency should aim toward providing clients with accurate information that is sensitive to individual needs and appropriate to individual levels of learning. To inform is only the beginning of client education, though. Your program should help clients use the facts to develop sound family planning practices and good reproductive health care. In the end, this is what your agency's education program is all about.

This chapter will discuss ways in which you can plan an education program to promote clients' effective health practices. By following the planning steps you will also be able to make the most out of the resources you have, and to develop the additional resources you need to do a better job.

Define the Problem

WHICH KIND OF PROGRAM IS BEST FOR MY AGENCY?

Your first step in designing a client education program is to define the problem. Look at the current agency situation; you must understand the present situation before you make plans to change it. What kind of education does the agency provide? Is it formal or informal? Who is doing the educating? Are you using supplemental materials, and are they appropriate? Who are your clients? Is the agency reaching the people it should? After you document what the education program is doing, you can assess whether it is meeting the overall needs of the clients, staff, and agency, by finding answers to the following questions:

- What problems are affecting your education program?
- What needs are not being met?
- What resources can be used?

Answering these questions will help you identify which kind of education program to plan. We cannot anticipate what problems and unmet needs should be addressed by your program--that's up to you. We can, however, give you some advice on ways in which you can identify the problems and needs.

Review your general program needs

When designing the agency education program, your plan should include strategies that will assure that the following basic needs will be fulfilled:

- A pleasant, "caring" agency atmosphere

  How would you feel if you walked into your agency for the first time? Is it pleasant and attractive, or cold and sterile? Do the staff members treat you courteously or do they growl? Are the staff members attentive, or harried and distracted?

- A smooth-running flow of clients

  Do the clients get through the agency procedures without enduring long, empty waiting times? Are they rushed through with little or no personal attention? Do your staff members have enough time to do their work well, or do they rush from task to task, never quite giving the concentration each chore requires? Is staff time wasted because the client flow bogs down?

- Competent, well-informed staff

  Do your staff members know what they are doing? Are they competent, both personally and professionally? How do they treat your clients? Are they well-informed about the latest medical and contraceptive technology? Are all staff members--from receptionist to physician--aware of ways in which they can help educate clients about family planning?

- Satisfied staff

  Are the members of your staff happy with their jobs? Do they feel involved with the clients and care about serving them? Or do they view clients as just bodies to be pushed in and out of the agency as quickly as possible? Do your staff members work well together, or do they go their own ways?

- **Satisfied clients**

  Do your clients return for their scheduled appointments, or are there a lot of "no-shows"? Do clients return to the agency before their scheduled appointments because they are having problems with their method? Do you have a high dropout rate? Do follow-up telephone calls to dropouts show that they stay away because they don't like the agency? Do your clients complain about the services and staff?

- **Well-informed clients**

  Do your clients learn enough about the various methods of contraception to make an informed choice? Or do they pretty much know which method they want before they come to the agency, and disregard other information presented to them? Do they ask many questions about their method after attending the educational session? Does your program have a way to judge whether the clients know enough about their selected method before they walk out the door? Do all of your clients know at least one back-up method by the time they leave? Do they know where to get emergency care when the agency is closed?

- **Clients who practice family planning effectively**

  Do your clients become pregnant only when they want to? Or do you find that many clients return to the agency with an unplanned pregnancy because of their ineffective contraceptive practices? Do many of your clients switch their method of contraception frequently, or are they satisfied with their present method? Does your program include partner involvement?

These are general needs of every family planning program, all of which your education program can help to meet. Do not base your plan on meeting only these needs, however; <u>your</u> program is unique. Remember to consult others to find out what unmet needs and problems should be addressed by your agency's education program.

Ask your clients and review their records

Asking your clients directly or indirectly (via questionnaire or suggestion box, for example) is a good way to identify what kind of education program they need. Make sure you know before approaching clients what questions you are going to ask. This will help organize your thoughts, thus saving the time and effort of everyone concerned.

Another valuable way to identify their needs is to look at the client visit records to see whom the agency is serving. If you know the characteristics of your clients, you can pinpoint many of their educational needs.

The age distribution is a characteristic of your clients that can tell you a great deal. For instance, teenage clients, especially the younger ones, usually need more detailed information about contraception, reproduction, and venereal disease than do older women. As a result, teens usually require more staff time, and they may require educational sessions and materials geared toward their age group. Older women may be more interested in learning about topics which are of little interest to teens, such as sterilization, infertility, and child-spacing.

When you check the records for your clients' age distribution, be sure to document their numbers. Documentation will help you justify and evaluate your plan, particularly if the program objective is addressed to a specific age group of clients.

The client visit records or the computerized summary will also tell you the proportions of new and return clients currently being served by the agency. This information is important for education program planning, because these two types of clients have different educational needs.

An education session for new clients of a federally-funded Title X agency must emphasize the following topics: the value of family planning in maintaining individual and family health; the use, effectiveness, and possible side-effects of all the contraceptive methods; male and female reproductive anatomy and physiology; the procedures and range of services, including infertility services when appropriate. On the other hand, the federal guidelines recommend that education services for return clients include information on reproductive health and disease prevention. Does your program have separate education sessions for new and return clients? If not, then a plan to do so is warranted.

The records will also help you identify client groups who need special attention, which in turn may reveal a need to plan for special education sessions or a specially qualified educator. For example, does your program have services for men? Do you have clients who have handicaps, such as being blind, deaf, paralyzed, or learning-disabled? Do you have many clients who are not fluent in English? If your education program is not currently meeting any of these needs, then a plan to do so is certainly justified.

Another group of clients who may need special attention is comprised of those whom the agency records have identified as "high-risk" clients. Agencies define "high-risk" clients in many ways, but two typical identifiers are: first, women at high risk of undergoing medical complications associated with either contraceptive use or pregnancy, and women whose babies are at high risk of medical complications, such as teens and women over age 35. Such women usually need special educational as well as medical attention. Second, women at high risk of having an unplanned pregnancy; these might include: teenagers, women under age 30 with five or more children, and women who have had repeated unplanned pregnancies.

Many family planning educators feel that these clients should at least have the option of receiving special educational attention from the agency. Does your agency have many high-risk clients? Are they receiving the education services they need? If not, you may want to draw up a plan for serving them.

Ask your agency staff

Every member of your staff educates clients in some way. The receptionist fields many questions over the phone and at the desk; she can identify problems and education program needs for you. So can the nurses, aides, practitioners, and physicians. Involve them in problem identification--ask them what kind of education program should be planned.

Look at your current and available resources

The resources that you have now and the ones you can develop or obtain reveal a lot about what kind of education program you can plan. Ideally you would have a large education budget, plenty of public and private space for conducting the sessions, and qualified, experienced educators who have enough time for carrying out educational activities.

Back to reality! If your agency doesn't have unlimited resources, the limitations may give you an idea of what kind of program you may or may not be able to plan. For example, if there is no private space available for your program and there seems to be no way that privacy can be created, then at least you'll know not to design an education program that includes private sessions--no matter how much privacy is needed. There are ways, however, that resources can be developed, and good planning--not magicians' tricks--can help. We'll give you some ideas later on in this chapter.

Write a Formal Statement of the Problem

By the time you have consulted with others, reviewed records, and assessed resources, you've probably uncovered a lot of problems. Now you and the planning team must decide which problem your education program should tackle. Once this decision is made, write a formal statement which shows what the program has not been doing in the past to solve the problem. Writing this statement forces you to pinpoint why your program has not been meeting the identified needs. Recognizing the program's past weaknesses helps you make plans for improvement--which leads to the next step in planning.

Set the Objective

HOW DO I SET THE PROGRAM OBJECTIVE?

To set the client education program objective, first determine how your program is going to reduce the problem. Then, decide how much your program can realistically accomplish by a certain point in time. When you write the objective make sure that the statement includes the following information:

WHEN:	The future point in time that the expected results will be reached.
WHERE:	The name of the organization that will produce the results (i.e., your program) and where the accomplishments will occur.
WHAT:	The nature of the program activities.
WHO:	What specific kind of client will be helped by the program.
HOW MUCH:	An estimation of how much will be accomplished, or the size of the expected results. Use numbers if possible, or define the indicators when necessary.

Select a Strategy

HOW DO I SELECT THE BEST STRATEGY?

The educational strategy you will use to reach the program objective will depend largely on the identified needs of your clients and on the amount of resources available. To help you identify and select the approaches that will fit your own agency situation, we will offer a range of sample solutions. The actual procedures and techniques will not be discussed in detail, simply because the purpose of this guidebook is to help you plan an education program for clients. How to deliver educational services is covered in depth in Family Planning Services: A Guide for Client Education, November 1980.

Client Educational Approaches

Your education program can use three different approaches for instructing the clients on good family planning practices. In general, these approaches are:

- small or large group sessions
- private sessions
- client self-instruction.

There are many variations on these forms. You are probably familiar with quite a few of these. You will be the best judge of what refinements may be required by your agency situation. Some variations to use are as follows:

Group Sessions

- Lecture: The educator presents specific information; questions may or may not be asked. This approach is appropriate when your only purpose is to inform.
- Structured Discussion: The educator introduces specific topics and structures a discussion around them, adding or correcting information when necessary.
- Open Discussion: Clients define the topics on which they need information, support and advice; the educator is present to answer questions.

Private Sessions

- Educator-Directed: The educator instructs the client and his or her partner. The topics of instruction are either defined by the educator or requested by the client.
- Client-Directed: The client and/or partner define the topics on which they need instruction, support, and advice. The educator is present to answer questions and to support clients in making decisions.

Client Self-Instruction

- Clients use educational materials from the agency to teach themselves about family planning. This method may be used along with other educational approaches to reinforce information received elsewhere.

Look at Clients' Needs

Selecting an appropriate educational strategy depends first of all on the needs of the clients. Some approaches are used primarily to inform and educate clients, others are used to provide clients with support to make decisions and resolve problems. Therefore, since the needs of the clients vary considerably, one approach might work well for some and not for others. For example, open group discussion works well with clients for whom you cannot predict their needs, such as return clients; this approach allows them to decide which topics to discuss. On the other hand, open discussion works less well in educating new clients, if it's used as the sole approach; the educator doesn't direct the discussion, so there is no way to ensure that new clients will receive complete information.

You may find that only one educational approach needs to be included in your plan. Or you may have identified several different client needs that can be met only by using a combination of educational approaches.

Look at Available Resources

Whether your objective is to use one or more approaches also depends somewhat on how extensive your resources are. Answering the following questions about resources will help you decide which approaches are feasible.

- How much time can be allocated for educational activities? The approaches require varying lengths of time. The lecture, for example, requires 15 to 30 minutes, whereas the structured discussion usually requires 30 to 60 minutes of session time.

- What are the client scheduling procedures? The group sessions require a scheduling system that ensures that there are enough people in the agency at the same time to form a group. The other approaches can be adapted to any scheduling system.

- What space is available for educational activities? The amount of space required for group sessions depends on the size of the group, which in turn depends on the size of your client load. The other approaches require private space away from the noise and distraction of the agency activities.

- How many educators are available? Group sessions require at least one educator. The number of staff required for conducting private sessions will depend on your estimation of how many clients need the service. If the client self-instruction approach is used, preferably there would be a staff member available to answer questions and, if necessary, operate equipment.

- What are the current staff skills? The staff skills vary according to the approach used. All approaches require the educator to have good communication skills and knowledge of the topics. In addition, some require an ability to lead groups, others require counseling skills.

- How much money and what kinds of materials are available? All approaches require the cost of staff time to be included in the budget. The client self-instruction and the educator-directed approaches require educational materials. The quality of the other approaches is greatly enhanced if materials are used.

In order to help you select the most appropriate educational strategy for your clinic program, all of the basic requirements for each approach are summarized in the table on the following page.

Identify Resources

HOW CAN I DEVELOP MY PROGRAM'S RESOURCES?

There is nothing more frustrating than identifying an educational approach that will best suit your clients, and then realizing that you do not have some of the resources required to implement it. Fortunately, there are ways to stretch your existing resources. Also, through careful planning you can develop or acquire some of the resources you need. Maybe a few of the following suggestions will help:

AGENCY EDUCATIONAL APPROACHES AND REQUIRED RESOURCES

Educational Approach	Clients	Time and Scheduling	Space	Staff		Funds and Materials
				Number	Competencies	
GROUP SESSIONS						
Lecture: Purpose is to inform	With same informational needs	15–30 min. Any scheduling	4 to 50 clients	1	Knowledge of topics; good communication skills	Cost of staff time. Materials optional but desirable.
Structured Discussion: Purpose is to inform and educate	Same as above	30–60 min. Block-time scheduling	4 to 20 clients	1	Same as above, plus able to lead groups	Cost of staff time. Materials optional.
Open Discussion: Purpose is to lend support and advice	Any, as long as not only approach for new clients	15–60 min. Block-time scheduling	4 to 20 clients	1	Same as above, plus counseling skills	Cost of staff time.
PRIVATE SESSIONS						
Educator-Directed Purpose is to inform and educate	With special educational needs	5–60 min. Any scheduling	Private space	Depends on number of clients who need a session	Same as for lecturer	Cost for staff time. Cost for educational materials.
Client-Directed Purpose is to lend support for decision-making	Any with problems or needs requiring individual attention	15–60 min. Any scheduling	Private space	Same as above	Knowledge of topics plus counseling skills	Cost for staff time.
CLIENT SELF-INSTRUCTION Purpose is to reinforce information received from other approaches	Any	15–30 min. Any scheduling	Depends on number of clients interested	1 is preferable	Ability to refer if answer is unknown	Cost of materials, including materials for handicapped and non-English speaking people.

Staff Requirements

All of the client education approaches require at least one staff person, but this does not necessarily mean one "body". Your "educator" could actually be, for example, a composite of some of the nurse's time, the receptionist's time and the aide's time. So think about re-assigning several staff members to assume some of the educational duties. We are not saying that this will be easy to do, since whatever time a person spends in educational duties is time taken away from other duties. As long as your agency director and staff support your program objectives, though, it can be done.

If you decide to re-assign staff duties, do heed these two important reminders: first, make sure that the staff's time and costs are included in your action plan. This way you can ensure that these figures will be reflected as specific items in the education budget. Also, by keeping track of their time, the new educators will know how their various tasks really stack up. Second, make sure that your "part-time educators" have the necessary skills for educating the clients; if not, they can develop the skills through in-service training. (Ways to develop a training program are described in Chapter IV of this guidebook.)

Another way to stretch your staff time for education is to use unpaid personnel (volunteers). For example, college students may be willing to work without pay so that they can acquire skills and experience to use later in the job market. If you use unpaid staff, make sure that their time is scheduled, and that they are given training.

Time and Scheduling Required

The type of educational approach(es) you select will determine how much time and what kind of scheduling are needed. Also, each client's needs will influence the length of time spent in educational activities, so allocating education time can be very tricky. Time is difficult to stretch and scheduling is hard to change. There are, however, a few things you can try if time and scheduling are your biggest resource problems, such as:

- Have a session or special hours reserved only for new clients, or only for clients with special needs. This way you can avoid having too many new and return clients coming to the agency at the same time. You will also be able to orient each education session solely toward meeting the special needs of the clients.

- Schedule the education session on a day or time separate from the medical activities. Some programs have done this successfully. Would it work in your agency?

- If you want to conduct group education sessions, and have a staggered-time schedule with a situation such as three clients coming in every 15 minutes, see if you can modify the schedule by having 10 to 20 clients come to the agency every hour. This way you will have enough people to form a group.

Space Required

Another resource that many education programs lack is space. There are three ways you can develop this resource: re-design existing space; look for additional space; or re-schedule sessions to allow for sufficient space.

Start with a very complete examination of all possible space in your agency. Be imaginative, look for unused space, and look for ways to use your space most effectively. For example, one agency "created space" in their waiting room for group sessions by placing two folding screens down the middle of the room: one side was designated for people to wait, the other for the group session. The screens did not diminish the noise, but at least they created a psychological buffer and sense of privacy.

Local merchants can often be persuaded to donate furniture, rugs and the other extra touches needed. Remember that people are often more willing to give something tangible--so don't always ask for money, ask for chairs!

Materials Required

The final resource which you might find limited is money for developing educational materials. Ideas for developing materials at little or no cost are suggested in Chapter V. You can track down free literature that meets your needs; for example, the Federal government and drug companies are good sources for free printed materials. You can also share materials and equipment (such as films and projectors) with other community agencies. Sharing materials is a practical alternative to owning them, especially if your agency is open only a few hours a day, or once a week.

Some people may label all of this "scrounging," but others call it being innovative. Whatever you label it, do not allow lack of funds to stop you from delivering educational services.

Develop an Action Plan

WHAT MUST BE DONE TO CARRY OUT THE PLAN?

Once you have determined what must be done to meet the identified needs of the education program, you should plan the following: what specific tasks will be performed, who needs to be involved, when the tasks will occur and what specific resources will be needed. We refer to this as an action plan because it describes precisely how the program strategy will be carried out. This plan is also very useful for monitoring program progress and it has cost information you will need for the budget.

Chapter I contains an example of how an agency education plan could be summarized in one table. Throughout this guidebook, different ways to develop action plan tables will be illustrated. For now, the task planning sheet on the following page is one example of how to summarize your action plan.

Design the Program Evaluation

HOW DO I EVALUATE MY AGENCY'S EDUCATION PROGRAM?

Your evaluation of the education program will measure both the program's effectiveness in meeting the objective as planned, and its efficiency in using resources to get the actual results. In other words, have you achieved what you said you would? And were the results worth the cost? In order to help you make a program evaluation plan, we will give you a few ideas about what measures you can use to judge the effectiveness and efficiency of your agency program.

TASK PLANNING SHEET

Need	Solution
Space	Create area large enough for group discussion and film viewing; and include private space for one-to-one communication.

Task	Why	When	Who	Resource
1. Evaluate all space at agency location	Determine unused places and ways to use space differently	Jan 10	Self	2 Hours
2. Elicit suggestions from fellow staff members	Input will add insight	Jan 11-13	Self and Staff Members	2 Hours
3. Review findings with agency director	Gain support	Jan 14	Self and Management	1 Hour
4. Design space plan	Overall view to allow for necessary changes	Jan 15	Self	2 Hours
5. Obtain posters, pamphlets, and materials as approved by staff review & budget	Create the education environment	Jan 16-30	In-house and Community Resources	6 Hours and $100
6. Obtain appropriate accessories: pillows, chairs, lights	Create a functional and comfortable environment	Jan 16-30	In-house	4 Hours and $75
7. Arrange space	Achieve objective of area large enough for groups with identified private space for one-to-one sessions	Jan 31	Self and Strong Helpers	4 Hours
Total				21 Hours $175

Effectiveness

Your agency education program primarily aims to promote clients' knowledge about the various contraceptive methods to help them practice effective family planning. One indicator you can use to judge whether your program was successful along these lines is: clients' grasp of the facts about their selected method and at least one back-up method.

Each client's knowledge could be assessed at the time of her post-exam "exit" interview. Usually the nurse talks to each client about when and how the selected method should be used. What you might do is devise a simple form for the nurse to record the following:

- Whether or not the client knows the facts about her method;
- Whether the client is a new or a return client;
- What method she selected; and
- The type of education session attended by the client.

Here is an example of this kind of form:

EXIT INTERVIEW SHEET

Date: January 10, 198-

Type of Client	Needs Additional Education on Method?						Type of Session Attended
Return/New	Pill	IUD	Diaphragm	Foam	Condom	Natural	
New						No	Private; Educator Directed
New	Yes						Lecture
Return		No					Rap Group
New				No	No		Structured Discussion

A form such as this can be used to monitor the education sessions and evaluate their effectiveness. For example, a record of the number of clients who require more instruction <u>after</u> they have attended a particular type of education session shows whether that type of session is effective as an educational technique. At the same time, a record of the methods on which the clients need further instruction can indicate to the educators which methods need to be discussed more thoroughly.

An indicator you could use to judge a client's success in practicing contraception is her pregnancy history after selecting a method, i.e., planned versus unplanned pregnancies. Reviewing the client visit records to note pregnancy history will give you this information.

Efficiency

One commonly used measure of education program efficiency is the number of clients receiving educational services per educator. For example, if during one year 500 clients have received educational services from 5 staff members, then the measurement of the program's efficiency would be that each educator provided education to 100 clients. Another way you could measure this is:

The number of clients educated per:

- Clinic session (such as 25 clients per session);
- Hour of educator's time (5 clients per staff hour);
- Education program costs (it costs $5 to educate); and
- Number of total clients served (1 client out of 2 receives education services).

Needless to say, there are many ways to measure efficiency. Look at your results in numbers (such as the number of clients served) and then compare them to the costs (in time, or money, or staff members).

Data Collection

Make sure that you have a way to record by type of visit how many clients receive education services. If the services are broken down by type (such as private session, rap group, or lecture), so much the better. You may already have a record system that contains this information. If not, "count noses" at every group session and record the number and date of the session. The same thing holds true for private sessions. This information can be used to measure both effectiveness and efficiency. An example of a form that can be used is given in Chapter III on page 63.

Do your staff members keep time sheets that show how much time they spend in each agency activity? If not, devise one for all the people who have education program responsibilities. An example of a time sheet is also found in the next chapter on page 62.

Your education budget will give you the information needed to compare the planned and actual program costs. By the time your well-thought-out plan is implemented, you should have your own budget. Think of that when you are going through the planning steps--it will help.

NOTES

III. Community Education

The community relies on your family planning educators for their expertise. In turn, you rely on the community to use your agency's services and to support your program's objectives. Your agency and community can help each other, as long as your program is planned to meet the community's needs.

Family planning educators are usually responsible for designing their own community programs to reach two general goals:

- Create strong community support of the family planning program.
- Recruit people who need and want family planning services into the program.

Community education can reach these general goals in many ways. It can also go far beyond providing the public with the facts about family planning and recruiting clients. Ideally, a community education program should also help people understand their own sexuality and promote good reproductive health care. Good planning can help your program reach these goals.

Define the Problem

WHAT KIND OF PROGRAM SHOULD I PLAN?

Before you can decide which type of program is most appropriate for your community, you must define the problem. Are the problems that you and others identify what they seem to be, or do they mask something else?

Often what we label as problems are really the fear and unfamiliarity expressed by community members--states of mind that can be changed through good community education. For example, lack of knowledge about the services your program offers can prevent the

community from supporting your efforts. Parents often fear that others are usurping the responsibility for their children's sexuality education. Such inaccurate perceptions can be dispelled by your community program.

Include Community Members

Community members can provide answers to the following questions to help you identify the problems that should be addressed by your plan:

- What problems or barriers prevent family planning education from reaching community audiences?
- What problems prevent the audiences from accepting or seeking family planning services?
- What are the causes of the problems?
- How can your community education program be planned to reduce or avoid the problems?

People representing various groups and interests in your community can offer a broad view of where the community stands with regard to family planning. This view includes information about the residents' knowledge, attitudes and practices. You will also be able to collect different perceptions about the barriers or problems that prevent residents from adopting and practicing family planning techniques. The active participation of the community in planning your program can also help to foster the atmosphere of acceptance and support so necessary for implementing your plan successfully.

The following is a list of people you might consider asking for help:

- school board members, administrators and teachers
- clergy and other religious workers
- community leaders (in government, business, and social policy)
- workers from welfare departments, drug and rehabilitation programs, crisis centers and mental health centers
- health workers from hospitals, health centers, family planning programs

- workers from youth-serving agencies
- parents
- representatives of the people who need the agency's services
- representatives from the media.

There are many ways to involve community members in the planning process. Here are some suggestions:

- Conduct a survey of people representing your community by telephone or by questionnaire. Make sure before you conduct a telephone survey that you develop a list of questions and a way to record everyone's answers. This way you can compare the answers directly to note which problems and suggestions were cited the most often. Also develop a way to identify the type of respondent, such as: white female 10th grader; middle-aged, black male PTA president. By knowing who cited what problem, you will be able to determine whether or not different segments of the population perceive the same problems.

- Meet with community representatives individually. Although this approach is time-consuming, it has the advantage of being more personal, so people will probably be more willing to share their ideas this way. Make sure that you determine which questions to ask, and that you develop the means to record responses and identify the respondents before you begin interviewing.

- Invite people who represent various segments of your community to a meeting. Or you can place a notice in the newspaper inviting all interested people to attend a meeting. Have everyone write and submit a list of problems before the discussion begins. Make sure that someone takes careful notes during the meeting so that you'll have a record of what problems were mentioned.

- Establish a community advisory board with specific activities assigned to them. Don't forget to include men and women, teenagers and members of the racial/ethnic groups in your community. The group might review films and materials distributed by your agency, represent you at various community meetings, and act as advocates for your program.

- Place posters around town or put a notice in the newspaper asking that citizens call or write the agency to make suggestions about what problems should be addressed by your family planning education program. You might get a few crank calls and letters, but you might also find that some problems exist that you had not suspected.

Look at Community Data to Identify and Document Program Needs

Reviewing community data can help you define and document the number of people who are affected by the problems you have identified. These data will also show you the number and characteristics of people who should be reached through your community education efforts. The people who need your services are commonly referred to as the "target population." Do you know who comprises your target population, and how many people belong to this group?

Family planning programs define their target population in various ways. For example, the earliest federally-funded programs focused primarily on recruiting and serving low-income women who were in need of family planning services. Later, the target population came to include sexually-active teenage girls as well. Recently some agencies have expanded the targeted group to include teenage boys and men.

It doesn't matter who your target population is, providing that you can justify the group's need for your services and that you know how many people in this group might be affected by your program. This information will help you plan your community education efforts to serve those who need it the most. Then, when it comes time to evaluate the results of the program's efforts, one measure you can use to judge the program's success is to compare the number of people you actually served to the number you planned to serve.

You can uncover some of the problems shared by members of your target population by looking at community data. Try using the data to answer some of the following questions:

- How many women in your target group experienced either a birth or a fetal death this year (or the year when the latest data are available)?

- How do the number of births and fetal deaths compare to previous years? Are they on the increase or decrease?

- Are certain members of the target group more affected by the problem than others? Young versus older teens? Blacks versus whites?

- How many of your community's teens drop out of school because of unplanned pregnancy?

- How many members of your target group have either died (maternal mortality) or suffered illness (maternal morbidity) as a result of pregnancy? What are the mortality and morbidity rates for infants born to these mothers? Are the maternal and infant deaths and morbidity on the increase or decrease?

- What is the incidence of venereal disease in your community? Who is affected?

Documenting this information will ensure that you have identified how your target population is affected by the problem. This factual approach will also help you get the money and community support for implementing your plan to address the problem. Parents, legislators, funding sources, and community leaders can be persuaded by statistics, so use them.

How on earth can you get the numbers? Here are some good community data sources:

- The Vital Statistics Reports issued (usually every one or two years) by all state and county health departments are an excellent source of information about your community. These reports include data on:

  - population estimates of all counties and major cities in the state. The estimates are usually presented by race and sex, and sometimes by age. By identifying the size and composition of your community's population and comparing it to the size and composition of your clientele, you can determine how well your agency services are reaching the community.

  - the number of births (in and out of wedlock), maternal and infant mortality, maternal and infant morbidity, and number of fetal deaths are given in these reports. Usually the data are presented according to the age and race of the mother.

- The Center for Disease Control (CDC), Atlanta, Georgia, publishes statistics on abortion, sterilization and hysterectomy in its annual surveillance reports. The data are presented for each state, and sometimes for communities as well. These data include:

- the number and characteristics of persons obtaining the procedures
- the mortality and morbidity figures.

- The record-keeping section of local hospitals, and health departments may be able to give you information such as:
  - maternal and infant mortality and morbidity rates
  - the incidence of patients admitted with complications resulting from use of a contraceptive method
  - the number of births, including premature births, by age of mother
  - the number of sterilizations and infertility tests conducted.

- School boards or individual public and private schools may have records of information such as:
  - the number of students dropping out of school for pregnancy-related reasons
  - the number of pregnant students remaining in school
  - the number of students taking sex education courses ("Family Life/Health Education" or the like).

- Welfare departments have records on community residents who require financial assistance; since one of the major target groups of family planning programs is low-income women, it would be useful for you to know what size this population is. You should collect data such as:
  - the number of women and the number of their dependents receiving welfare assistance (AFDC, Food Stamps, general assistance payments, Medicaid)
  - the characteristics of female welfare recipients, such as age, race, and socio-economic status.

- Colleges and universities often collect and analyze community demographic and health data for research projects.

- Newspaper articles often report community health statistics.

Look at Available Resources

Assessing resources at the outset of planning your program can help identify what program strategies may be the most feasible. For example, is there at least one staff member who can serve as the community educator, or will you have to hire someone? Do you have an efficient system for handling telephone inquiries? Is there space available for holding a community meeting?

As the answers to all these questions emerge, you will become able to document the problems and needs, analyze your resources, write a formal statement of the problem, and lay the groundwork for your community contacts. Then you will be able to decide what program objectives can really meet the needs of your community.

Set the Objective

HOW IS THE PROGRAM OBJECTIVE SET?

The objective is a written contract stating what the program is going to do to solve the problem. To make this contract work you must answer "yes" to the following questions:

- Will the program's accomplishments help to meet the identified needs of the community?

- Will the program objective be supported by the community? By your agency director?

- Does the program have the resources required to reach the objective?

- Are you sure the program can accomplish as much as you stated in the objective?

- Have you written a well-defined objective that includes the elements of when, where, what, who, and how much?

A word of caution--don't include any grandiose statements in your objective about your program's future impact on community problems, such as "Our program will reduce the teen pregnancy rate." Remember that the causes and the cures of community health problems involve many factors. Your program may contribute to reducing a problem but it is not going to solve the problem on its own. Furthermore, even if the problem situation changes, you would have no way to measure whether the change was due to your program's efforts alone. Keep your objectives simple, realistic, and measurable!

Select a Strategy

WHAT ARE SOME COMMUNITY EDUCATION STRATEGIES?

You can design your program to furnish any or all of the following services to the community:

- Supply information
  - provide public speakers
  - maintain an efficient system for handling telephone inquiries
  - provide information to the media
  - distribute printed information
  - maintain a family planning library for public use
- Provide educational services
  - supply educators for community groups
  - offer training in family planning education to community professionals

- assist the community in developing a curriculum in family life and human sexuality for schools

- Furnish outreach
  - provide referral and follow-up
  - recruit people in need of family planning services.

There are many strategies that can be used to provide these community education services. You can get some good ideas by referring to the bulletins issued by the National Clearinghouse for Family Planning Information, P.O. Box 2225, Rockville, Md. 20852. Here are a few suggestions that have proved successful for other programs:

Programs for Teens

- Train teenagers to be family planning educators and sources of referral for their peers. Solicit support from the schools to choose the participants and to promote acceptance of the peer program at school.

- Develop a "family life theater" program for teens where teenagers convey information about parent-child relationships, love, sex, and drug use through a series of improvisational skits.

- Organize community advisory committees of adolescents, parents and adults to plan, develop, and coordinate activities for bringing teens and adults together. Bringing teens and adults together should foster a better understanding of each other's problems and concerns and improve communication. Recreational activities, for example, are a good way to close the age gap.

- Give high school journalists background material for articles about adolescent sexuality, pregnancy and parenthood.

Programs for Parents

- Offer sexuality education programs for parents of teens, pre-teens, and young children.
- Train community members to conduct sex education programs for parents.
- Distribute literature to parent groups.
- Provide speakers and educators to PTA programs.

Community Programs

- Using various media, advertise your services with the message that something can and should be done to reduce the number of unplanned pregnancies.
- Provide educators for non-school settings such as detention homes, YWCA and YMCA groups, and other youth groups. Focus on developing decision-making and communication skills.
- Establish and operate a hotline in cooperation with one or more service agencies.
- Sponsor a "community health conference" with a wide spectrum of participants.
- Set up health displays at community sponsored fairs.
- Sponsor a media fair for professionals and other community members. Show films and display materials. Conduct workshops based on participants' needs.
- Distribute a newsletter to the community. Include information such as: an introduction to your staff, and the schedule for upcoming community education programs, and an update on the latest research on fertility management.
- Offer to be the source of technical information on reproduction, human sexuality, and family planning for school health teachers, nurses and residents at community hospitals.

Identify Resources

HOW CAN I DEVELOP RESOURCES?

Many of the strategies you devise will depend on the agency joining with other groups who share common concerns and who are willing to work cooperatively with you.

Form Linkages with Other Groups

You can stretch the resources of your agency, increase services, and avoid a duplication of effort by linking with community organizations. For example, link with:

- A local church, to co-sponsor a series of discussions for parents and teenagers.
- The Junior Service League, to co-sponsor a thrift shop as a fund raising activity for your program.
- Community colleges, to establish a once-a-week clinic, where you use your time and their space.
- A local library, to display educational materials and co-sponsor an evening seminar.

Linkages can be formed with a wide variety of groups; it is amazing how many interests can be shared when your resources are limited. Look to the following in addition to the examples shown above: schools, PTA's, recreational groups, volunteer organizations, social service agencies, health agencies, and private businesses.

Create Networks

Another way to stretch resources and expand your community education efforts is "networking," where public and private agencies come together to solve all aspects of a mutually identified problem. The problem usually affects a wide spectrum of the community and requires a variety of participants to share the responsibilities for solving it. For example, teenage pregnancy may be a concern of your entire community. One of the best ways to address this problem

might be to work together with several community health and youth service agencies. Each agency could develop a community-wide strategy, supplying the services for which it is best suited. A coordinated effort such as this is much more likely to put a real dent in the problem than if each agency worked on it alone, because the participants can tackle the problem from many different directions.

Through networking you can demonstrate your program's commitment to solving community health problems. In addition, you involve others (at no cost!) in helping to promote effective family planning practices in the community.

Stretch Your Staff Capabilities

Education programs often raise a hue and cry for more staff, especially when a new program is being planned. One way that many programs have successfully overcome their staff shortages is to use "unpaid staff"--otherwise known as volunteers. Some of the community members who helped you identify the problem may be willing to devote some of their time to your program. Community agencies might be sources of unpaid staff; this is the kind of assistance that makes linkages and networks. Many family planning agencies have increased the number of their staff educators by offering internships to college students. The students get the work experience and sometimes academic credit, while the agency gets their valuable assistance.

If you decide to use unpaid staff to help conduct community education activities, make sure they receive the same kind of orientation and training that you offer the paid staff. In fact, the only difference between your paid and unpaid staff should be the paycheck.

Use the Media

Another way to extend your program's family planning message is to let the media do the work for you. First of all, contact local television and radio stations to make a Public Service Announcement (PSA) about your agency services, including any community education activities that are scheduled. PSA's reach a large percent of the population that you may be unable to reach otherwise. A good source of information on how to produce and use PSA's is the National Clearinghouse for Family Planning Information.

Consider writing newspaper articles or getting a journalist interested enough in your program to do some writing for you, or

use an articulate spokesperson to present your message on a local television or radio talk show. If you've identified a serious community problem which will be addressed by the education program, there is already enough reason for an agency representative to be invited as a guest.

If you or other agency staff members lack the skills necessary for using the media effectively, turn to members of the community who might be able to help you. Are there other community agencies who have used the media successfully in the past? If so, ask them how they did it.

Make the Best of Staff Time

If you have limited staff time allocated to community education efforts, make the best use of the available time by working directly with a few people who can pass your message on to many others. For example, offer family planning education training to professionals rather than trying to reach the people they serve. This approach would find you training the local high school teacher rather than conducting a classroom program yourself, or training nurses rather than initiating a bedside program at the hospital.

Develop an Action Plan

HOW DO I PLAN TO CARRY OUT THE CHOSEN STRATEGY?

By this stage of planning the community education program, you have already set objectives after identifying and documenting the needs. You have also selected the best strategy to carry out each objective using available resources. Now you are ready to develop an action plan which will delineate who is going to do what, when and with how much time and money. You can develop a budget for the program by noting the itemized and total costs of resources contained in your action plan. The table you develop to plot the planning information might look something like the following:

STRATEGY:					
Tasks	Dates		Person Responsible	Costs	
	Start	End		Time	Money
Phase 1 -- Setting up the Program Task: Task: Task:					
Phase 2 -- Conducting Activities Task: Task: Task:					
Phase 3 -- Evaluating Results Task: Task:					
TOTAL:					

Design the Program Evaluation

HOW DO I EVALUATE THE PROGRAM?

Community education programs are difficult and frustrating to evaluate, because it is impossible to measure all the ways in which the audience has responded to the message. You cannot, for example, count the number of people who responded by going to some other health provider or by improving their individual health practices. Nor can you know how many people passed your message on to others. Your community program has many beneficial results, most of which cannot be measured directly. This does not mean you shouldn't bother with evaluation, though. There are several indicators and also one direct measure you can use to judge the progress and success of your program's efforts. The evaluation plan could include any or all of the suggested indicators which follow:

Indicators for Program Effectiveness

One commonly used indicator of a program's success is the number of people from the target population who have been recruited as clients through the program's efforts:

- How many people in the target population were contacted through your community education activities?
- How many of these people actually became clients? (The source of referral to the agency cited by new clients will tell you this.)
- Did the number of persons recruited equal the number stated in your objective?

Another indicator is a comparison of the number and characteristics of the community participants with those of your target population:

- Are the participants in the educational activities those you had planned to reach?
- Has the program reached as many members of the target group as planned?
- Has the program reached more of the target population than had been the case before the plan was implemented?

A third indicator of program effectiveness is a comparison of the number and type of requested community education activities with the actual activities.

- Was your program able to meet all of the requests?
- Did the program actually conduct as many activities as had been stated in your objective?

The number and kind of educational and informational materials distributed constitute yet another indicator:

- What was the audience's response to the materials? Was there an increase in demand for them? Did you find that the materials were discarded?

- Did you distribute as many materials as you had planned?

- Were more materials distributed than had been before your plan was implemented?

Other indicators that have been used by education programs to evaluate effectiveness include:

- The number and kind of telephone inquiries from the public.

- The number of favorable and unfavorable reports by the media about the program.

By using any or all of these indicators plus those you develop, you will be in a good position to monitor the progress of the program and assess whether it has achieved all that was planned. In the end, you will also be able to judge whether the community education program was able to meet the identified needs of the community.

Indicators of Program Efficiency

You will also want to judge whether the program efforts were efficient. Your program's efficiency can be judged by answering these questions: How much staff time was spent in conducting your program? How much did the other program resources cost? Compare these costs in time, money, and other resources to the actual results of your program. Were the results worth the cost?

Here are two interrelated examples (using recruitment figures) of how to do the arithmetic for making your comparisons.

1. Assume that 300 persons participated in your community education program (i.e., your recruitment contacts), and of these, that 20 became new clients (persons recruited). Divide 20 into 300, and you'll come up with 15. This means that out of every 15 persons your recruitment program contacted, 1 was actually recruited.

2. Assume that the community education program cost $1,000 (total recruitment costs). Dividing 20 (persons recruited) into $1,000 (cost) will tell you that it cost about $50 for each person recruited. Going through the same process with the number of those contacted will tell you that it cost $3.33 for your community education program to reach each person.

You can analyze the information in many ways, such as the following:

$$\frac{\text{Total recruitment costs spent}}{\text{Number of persons recruited}} \qquad \frac{\text{Total recruitment costs spent}}{\text{Number of recruitment contacts made}} \qquad \frac{\text{Number of recruitment contacts made}}{\text{Number of persons recruited}}$$

$$\frac{\text{Number of personnel hours spent}}{\text{Number of recruitment hours spent}} \qquad \frac{\text{Number of personnel hours spent}}{\text{Number of persons recruited}} \qquad \frac{\text{Number of personnel hours spent}}{\text{Number of recruitment contacts made}}$$

As you can see, efficiency can be measured numerous ways, but you need not use all of them. Just choose and stay with a few that are particularly revealing.

Monitor Your Program

Make a periodic review of your records of community and school contacts, requests, presentations, the number and type of participants, etc. By doing so, you will always know approximately how many persons have already been exposed to your educational program and also where to direct future efforts. Also, if you continually compare the ongoing program results to the actual costs incurred, you will be able to develop and revise the program for the most productive and cost-efficient results.

Data Collection

The type of data you collect will depend on the type of indicators you use to monitor and evaluate program effectiveness and efficiency. Some of the data necessary for evaluation are already collected routinely by your agency, such as: the source of client referral, the number of people reached through community education, and the total and itemized program costs.

You may find, however, that new data must be collected. The best sources for collecting and recording data for evaluation are the community educators themselves. Have them keep careful records for reporting their progress regularly to the program supervisor, to other members of the staff, and to each other. The educators may

collect and report on such data as: the number and type of requested and actual community education activities, the number and kind of participants, and the amount of time spent in each activity. The educators should also keep a record of: the topics discussed in community sessions, the problems encountered during community activities and their subjective impressions of the program's success. The following are examples of forms for recording the information:

TIME AND TASK REPORT

Community Education Rendered for Period: Name: _____

From _____ To _____

Date	Hours	Tasks Performed
Total Hours	____	

COMMUNITY EDUCATION PROGRAM

Date:

Place: _____

Time: From _____ To _____

Number of Attendees:

Male: _____
Female _____
Age Range: _____

Discussion Topics:

Significant Questions Asked By Attendees:

Problems Encountered:

Comments:

From Evaluation to New Planning

Looking at the data that are routinely collected and examined will give you an idea of how well the community program is doing and what else needs to be done to make the efforts more successful. Remember that the end is but the beginning; planning is cyclical. And evaluation gives you the evidence for continuing to plan.

NOTES

IV. Staff Development

The most critical ingredient of a family planning education program is made up of the people who provide the services. More than anyone or anything else, they can make the difference between the program's success or failure in meeting the educational needs of the people they serve. For this reason, staff development should be part of your education plan and it should receive the full support of the agency administration.

WHAT IS STAFF DEVELOPMENT?

The following is our working definition of staff development:

> Staff development is . . .
>
> education for a job, a task, or an activity.

Staff development acquaints personnel with the program objectives, and provides them with opportunities to develop their skills, to update their knowledge, and to learn new techniques--all of which lead to better service for the public.

WHO NEEDS STAFF DEVELOPMENT?

Each staff member contributes in some way to meeting the program's objectives. Offering educational opportunities to all interested staff members expands their professional development and also promotes high morale and a sense of purpose.

Staff development programs should be planned both to orient new personnel to their job responsibilities and also to provide continuing education to experienced staff members. By making staff development available to all personnel, you build the staff teamwork and cooperation that is so vital for the success of the family planning program.

Define the Problem

WHAT KINDS OF STAFF DEVELOPMENT ARE NEEDED?

Step 1 in planning an educational program for your staff is to determine what skills they need to develop in order to do a better job. The person designated to formulate the staff development plan can also identify subject areas where education is needed. Answers to the following questions will make these planning decisions easier:

- What are the agency's and program's objectives?
- What staff skills are needed to reach the objectives?
- What are the present skills and responsibilities of each staff member?

If you find that the current staff skills do not meet all of the requirements of the program objectives, then you can identify the areas in which staff members need to be educated. There are many ways to conduct the needs assessment for staff development; the following sections will give you a few ideas.

Identify the Required Staff Skills

Your agency records will provide some clues to which staff skills are needed, because all programs maintain up-to-date job descriptions for each staff position. Presumably, these descriptions will include information about the skills that each staff person should possess. As a double check, however, you may wish to ask each staff person to write his or her own job description and have this information appended to the employment records.

In addition to the specific tasks to be done, each job description should contain a profile that describes the knowledge, specific skills, and the personal traits best suited for the position. The descriptions could be reviewed yearly by the administrator and staff and updated whenever necessary to reflect changes in duties. Keeping track this way, you should have an accurate record of what staff skills are necessary for meeting the objectives of your family planning program.

Assess the Actual Staff Competencies

After you and the staff have identified what skills they should have, the next step is to tally up the skills already available. There are many techniques that are useful for reviewing your staff's various skills. Use the ones that will work best in your program, and involve the whole staff in your assessment.

- A self-assessment checklist or questionnaire is a way of allowing the staff to indicate anonymously which skills they have and which they would like to develop.

- A suggestion box can be used to reveal many of the hard-to-admit concerns.

- Staff meetings are a way to foster open discussions about the weaknesses and strengths of the overall staff.

- Role playing involves the staff members playing various roles of dealing with clients, followed by a discussion.

Whichever assessment method is chosen, make sure it is conducted in a non-judgmental manner; this will assure people on the staff that figuring out which skills they have and don't have in no way threatens their jobs. You will then stand a better chance of identifying how to develop the necessary staff skills.

The following checklist is an example of a non-threatening technique that could be used by the staff to assess their own skills.

SELF-ASSESSMENT CHECK LIST

Directions: Rate your present level of skill in the following areas using the scale below, and place the appropriate number on the line at left.

0	1	2	3
not applicable	little knowledge	some knowledge	well-informed

Medical

_____ female reproductive anatomy
_____ male reproductive anatomy
_____ Contraception - use, effectiveness, contra-indications, side effects, research
_____ pill
_____ IUD
_____ diaphragm
_____ spermicidal agents (e.g., foam, suppositories, etc.)
_____ condom
_____ natural family planning/fertility awareness
_____ sterilization
_____ sexually-transmitted diseases
_____ physical examination
_____ understanding of medical procedures in my agency

Attitudes/Communication

_____ feel comfortable with my sexuality
_____ feel comfortable discussing sexuality
_____ accept various sexual life styles
_____ establish rapport with clients
_____ listen actively
_____ focus in on client's immediate concerns
_____ recognize client's unspoken fears
_____ relate to client's partners
_____ recognize need for referral
_____ complete interview in allotted time
_____ understand adolescent development
_____ feel comfortable talking to teens
_____ feel comfortable hearing street language
_____ relate to client's family
_____ communicate with agency co-workers

This checklist was developed by Joan S. Benesch, Training Associate, Family Planning Training Institute, Baltimore, Md. Used with the author's permission.

Set the Objective

HOW DO I SET THE STAFF DEVELOPMENT OBJECTIVE?

Whether you are developing a yearly plan or an individual session plan, the rules for setting the objective remain the same. When writing your objective, make sure that it contains answers to the following questions:

- When will the staff development session occur?
- Where will the session be conducted?
- What kind of staff development will be offered?
- Who will conduct the session?
- Who will attend the session?
- How will you measure the effectiveness of the session?

For example, here is a well-written, measurable objective:

"At the conclusion of the staff development session conducted by Dr. (name) on (date), staff members will demonstrate their understanding of all the contraceptive methods offered by our agency by being able to list at least four basic facts about each method."

Now practice writing your own.

Objective

When: _____
Where: _____
What: _____
Who: _____
How much: _____

Select a Strategy

WHAT KINDS OF STAFF DEVELOPMENT PROGRAMS ARE THERE?

Programs take many shapes--there is no single format to be followed; be sure to plan a variety tailored to the staff needs you have identified.

In-House Staff Development

In-house staff development is for both paid and unpaid personnel and takes place within the agency. It can be informal or quite structured. The form and content of an in-house program varies according to the needs of the staff. It can provide personnel with on-the-job instruction in various skills, such as decision making or the dynamics of group leadership. It may offer them continuing education, such as an update on information about spermicides or a lecture on how to write a proposal. An in-house program can also offer job orientation for new staff, or agency orientation for incoming members of the advisory board. To help you decide what type of program to plan, here are some approaches that require few resources and that do not interfere with agency activities:

- The brown bag or pot luck lunch and wine and cheese after work are two approaches where you use short periods of time to have staff members share their expertise. For example, your nurse practitioner could make a brief presentation on the considerations of risk for clients taking the oral contraceptive. Or you might conduct a staff debate in which feelings are allowed to surface--a good technique to discuss such troublesome issues as teenage sexuality and unplanned pregnancy. (Generally speaking, in-house staff development focuses on increasing knowledge rather than changing attitudes, but it is helpful to "air" feelings). You could also select a topic for which each staff member might bring in a pertinent newspaper or journal article to share.

- Staff meeting time can be used in part to cover topics you have set as objectives for your staff program. (When all personnel are present, a meeting is also a good time to review films and materials being considered for purchase.)

- The peer approach is where one co-worker observes another; the "observer" can learn new things to try by using the co-worker as a model. This approach can also be used between your agency and another which has similar programs.

- Workshops can be initiated by establishing a theme and having everybody participate in a half-day or full day of discussing a particular topic thoroughly. You can invite experts to present information, ideas, and techniques to the staff. This approach, more than others, may require a greater commitment of resources, including costs for staff time and for the experts' fees if they do not donate their time.

Staff Development Programs Outside the Agency

You should also identify programs in your community and region that would help members of your staff improve their expertise. The knowledge they acquire can be extended to the remaining staff through a special staff meeting, or through circulation of the program materials. Community and regional training programs are usually structured learning situations where some of the following approaches are used:

- Community Workshops are similar to in-house workshops, although the participants come from different agencies. A workshop usually covers one topic of interest. You can have two staff members split one day, with one attending in the morning and the other in the afternoon.

- Conferences usually last more than one day, and often cover more than one topic. A valuable outcome of conferences is that a wide range of professionals get to share ideas and educational approaches.

- Regional Training Centers offer staff development courses on different topics throughout the year. Staff members of family planning projects are eligible to enroll in these courses. Information on obtaining these services is available from the Regional Offices.

- One-Shot Educational Events are short presentations of information on topics of interest to your agency staff; they are usually held by groups outside of your program. For example, one member of your staff might spend a couple of hours in the evening attending a special demonstration of the techniques of breast self-examination

at a local hospital. Another might visit a pharmaceutical company to learn more about their latest research on spermicides. Or a local drugstore might sponsor a new community education campaign on VD prevention and invite your staff to attend the instructional session for employees.

As you can see, many different forms of staff development programs can be planned. Whatever possibilities you select, the plan should include some incentives for participation, such as: certification of attendance, notation in the personnel record, or an offer of credits for continuing education (CEU's). Incentives provide participants with documented evidence of their professional development, which may help them advance in their careers.

Identify Resources

WHAT RESOURCES ARE NEEDED FOR STAFF DEVELOPMENT?

Time and costs for staff development should be allocated in the budget and supported by the administration. Visions of multi-dollar signs need not dance through your head if you plan a realistic number of educational opportunities per year.

For example, an appropriate objective might include scheduling one hour a month for in-house staff sessions and allocating time and costs for staff members to attend either an all-day conference, or two half-day workshops.

The in-house staff development budget could cover such items as the costs for the instructors, materials and equipment. It could also include an allocation of staff members' time for planning and preparation of the sessions. The budget may also include the costs and travel allowances for staff to use non-Title X-funded education programs, provided that there is documented justification.

WHO PROVIDES THE INSTRUCTION?

Use the talent of your own staff as instructors whenever possible; however, do not be afraid to bring in outside help. You can look for assistance in developing the staff program from the DHHS Regional Training Centers, education specialists in other family planning services, the National Clearinghouse, other health societies (for example, the American Cancer Society) and professional societies that deal with skills development of health personnel. Organizations such as these are often willing to share information and staff.

Your community is also a good source of instructors. For example, the public school system may have teachers who are willing to offer technical assistance to your staff for developing counseling or teaching skills.

Develop an Action Plan

HOW DO I DEVELOP AN ACTION PLAN FOR STAFF DEVELOPMENT?

At this point in planning, you must summarize all the previous planning steps into an action plan. By doing so, you will be able to record what activities will take place and when, who will be responsible, and what kind and how many resources are required.

A chart of the action plan can be used to list what must be done to set up the staff program. Have columns designating times, names of people responsible, and costs. You can include on the chart items such as: reserving a room, recruiting resource people, notifying participants of the time and place, arranging for refreshments, getting handouts ready, obtaining a blackboard, and so on. This type of chart can be used to monitor progress, and it will contain the cost information necessary for your budget.

An action plan table can be developed for each session, but you should also develop an annual table. The following example shows one way you could summarize the annual activities:

ANNUAL STAFF DEVELOPMENT PROGRAM														
Session topics	Months												Costs	
	J	F	M	A	M	J	J	A	S	O	N	D	Time	$
Total														

Design the Program Evaluation

WHY EVALUATE?

Your agency director and funding sources will want to know whether the objectives of the staff development program have been reached successfully (effectiveness), and whether the results were worth the costs (efficiency). Evaluation will provide the answers.

The importance of evaluation goes far beyond meeting the reporting requirements: it actually helps both the participants and the instructor. Participants benefit from their evaluation of the program because it provides them with a voice in planning future sessions, and also with the opportunity to review and summarize what they have learned. In turn, the participants' evaluation helps the instructor. After devoting time and energy to planning and presentation, the instructor needs feedback from the participants. Their criticisms, suggestions and praise can help the instructor and others plan and conduct better sessions in the future.

HOW DO I EVALUATE STAFF DEVELOPMENT?

In staff development programs, the participants are aiming for an increase of their knowledge and skills, and possibly a change or at least an increased awareness of their own attitudes and behavior. The results of the program should be measurable either directly or through indicators.

Look at Session Outcomes

When conducting the evaluation, first focus on the expected outcomes of the activities. Do the staff members know all the symptoms of VD? Do they know how to ask an open-ended question? Can they use various educational materials to reinforce the information presented to clients? The specific responses to these questions can help you evaluate the program.

The best judges of a staff development session are the participants themselves. You can give each participating employee a chance to comment on the good and bad points of the session, noting especially whether it communicated the necessary facts. The staff might also agree to be tested on their acquired knowledge and skills immediately after the session, and then again in six months, to see whether they still remember the information. In addition to the staff, the instructor, an independent observer, or a supervisor may evaluate the staff education sessions.

Look at Job Performance

Ultimately, the true measure of program effectiveness and efficiency is the actual performance of the staff. Has your program helped the staff develop and/or improve their skills? As a result, do they offer better services to your clients and community?

In order to evaluate job performance, you can use much of the information gathered in Step 1 of planning when you determined what kinds of staff instruction were required. For example, each person on your staff has already identified what skills his or her job position requires. Using this profile as a standard for comparison, have the required skills been strengthened through staff development? You have also documented the staff's actual competencies. After instruction, were their areas of competency improved?

Another evaluation method, which is used by Regional Training Centers, is to have each participant write a contract which describes the job-related skills she/he plans to use within six months. Each participant is contacted later and asked whether their objectives have been reached.

Methods to Use

You can measure these pre- and post-training differences by using any of the approaches described earlier for assessing the staff needs for training, namely: staff meetings with open, non-threatening discussion; an anonymous checklist or questionnaire for staff members; and a permanent suggestion box for staff members to define which of their skills still need to be developed. You can also have clients rate the effectiveness of the staff's performance through interviews, questionnaires, or a suggestion box.

Regardless of which method you use for evaluation, you will discover new ideas, new problems, and new staff needs. Thus, your evaluation will lead to new planning--and the cycle will continue.

NOTES

V. Educational Materials

Materials are the tools of education. Although brochures, films, posters and all other educational materials can never be a substitute for educators, they do offer many advantages which can supplement and enrich your program. If used effectively, they can help to attract and hold the learner's attention and emphasize key points to remember. Materials can also be used by the educator to convey information that is difficult to verbalize; for example, pictures or a film about the pelvic exam might be worth a thousand words.

People differ from one another in how they take in new information best, and materials can impart information to suit individual learning styles. For example, one person might respond well to hearing a 10-minute audio cassette lecture supplemented by a question-and-answer session with an educator, while another person might learn more from seeing a slide show and then reading a pamphlet. Since your clients, staff, and community members probably have every kind of learning style there is, you should have a range of materials available for their use. Good planning will assure that your program's materials will meet the needs of those it serves.

Define the Problem

HOW CAN I IDENTIFY WHAT KINDS OF MATERIALS ARE NEEDED?

As with all planning, you must first determine if the existing materials are meeting the program needs. If you find that they are not, then you've identified a problem; a plan to change the situation may be justified. Answering the following questions will help you determine whether there is a need to design a plan for selecting and developing materials:

- Can the program objectives be reached through the use of existing educational materials?
- If not, then what materials are needed?

Here are some suggestions on how you can go about finding the answers.

Look at the Program Objectives

Your program objectives will tell you a great deal about what educational materials are required. Knowing what the program is expected to accomplish, you can determine which materials can help. First examine the objectives of your agency, staff development, your client and community education programs. What are they? What materials are necessary to ensure that the anticipated results are reached? For example, the need for materials suitable for parent education may be indicated, if an objective is to establish a community program for parents to help them educate their own children about sexuality.

Assess the Materials Available

After you have defined what materials are needed to help achieve the program objectives, you must then determine whether they are available. You can do this by reviewing the stock on hand. There are certain things you should look for in the educational materials you plan to adopt. They should:

- Be relevant to your target population: The materials should suit both the clients you have and the clients you want. For example, if the agency is attended mostly by adults and you want more teens to come, note whether the tone and content are appropriate. Teens may have less concern with using family planning to space their pregnancies and more concern with finding a relatively portable method of birth control. And a brochure that tries too hard to speak in the current teen lingo might be laughable to college-age clients (not to mention how funny it will seem to everyone in a year or so!)

- Reflect up-to-date information: Timeliness is a consideration when it comes to content as well as style. Materials should reflect the changes in family planning information from new studies. The National Clearinghouse for Family Planning Information is an excellent source of up-to-date information. Remember, these materials are in the public domain and can be duplicated by your agency without permission.

- Be accurate and consistent: Of course, all the materials your agency uses should be accurate and consistent with each other. Clients who read in a drug company's leaflet that: "foam is a highly effective method" and then are told by the educator that "foam should be used with other more effective methods" are going to be confused, perhaps to the point where they wonder whether anyone really knows the facts.

- Be visually pleasing: The teaching materials should be eye-catching. An attractive logo, a thought provoking brochure cover, or a poster that asks an open-ended question will attract the interest of your clients. Be aware of the colors used, too. Sometimes a poster isn't read because the printing is too small and the color is hard on the eyes.

- Be easily understood: The educational materials your agency offers to clients must be readable and basically non-technical in nature. Correct terms for body parts should always be used. Check all publications and posters before presenting them to clients. Watch for difficult words and scientific terms. Have someone in your agency learn how to do a "readability test" and check all printed materials offered to the public.

- Reflect your clients' cultural values and languages: Know your target population and the language(s) they speak. If your clinic serves a predominately Spanish population, be certain you offer your educational materials in Spanish as well as in English. Also, be aware of the cultural values of your clients and neighborhood. The materials should not go against the values of the clients you serve. Before presenting materials for public use, scrutinize them to make sure they contain no sexual, racial, religious, or other biases.

- Be honest: Materials offered for client education and information must not offer false reassurances about any aspect of contraception, medical side effects, or other health issues. Be certain that the theoretical effectiveness of a method is coupled with the actual use effectiveness, and that the differences between the two are made clear. Make sure you have materials on all contraceptive methods (including natural family planning) that are completely objective in how the facts are presented.

- Be used both inside and outside the agency: It stands to reason that your educational materials should also be usable outside of the agency setting. Be sure they are compatible with community values. Look over your posters and publications to see if they have multiple uses; you may decide not to develop or reorder materials that can be used only in-house.

Form an advisory committee to help review and comment on all the materials at least once a year, using the items listed above as criteria. The advisors should include staff members, clients and representatives from the community. You could also use health educators from other community agencies to help in the review. If you decide that additional technical assistance is required, check with your Regional Office to see if a consultant is available.

When reviewing the educational materials, look for gaps; the ones you use may not cover all of the information your staff, clients and other advisors consider relevant. For example, do your materials for teens include information on abstinence as a pregnancy prevention method?

Going through this review process will help you identify what kinds of materials are unsuitable. Note which ones need to be replaced, and which need to be replenished. Then you can take the next planning steps to acquire or develop the educational materials that are needed by your agency.

Set the Objective

WHY SET AN OBJECTIVE FOR MATERIALS?

By setting the objective, you translate the need for materials into a positive statement which specifies what kinds and how many will be used for program activities, where and when they will be used, why and for whom. When you set an objective to obtain educational materials, make sure that they reinforce your agency's potential for success.

Select a Strategy

HOW CAN I DEVELOP AND USE MATERIALS?

The same criteria you used to review existing materials apply to developing your own as well. You may prepare something as simple as a mimeographed instruction sheet, or as highly sophisticated as a slide/tape presentation. The talent available on the agency staff, your judgment of the cost-effectiveness, and your clients' specific needs are guides to how much should be developed in-house. This section makes some suggestions for using educational materials, including some "home-grown" ideas.

Printed Materials

- Prepare a pamphlet that introduces the client to your agency procedures such as pelvic exams, Pap smears, and pregnancy tests.
- Print "agency calling cards" and be sure to include the agency's name, address, phone number, and hours.
- Obtain permission to reprint a section of a publication that you consider valuable.
- Re-use the good pieces of old printed materials.
- Display materials in an orderly but accessible way, making sure your clients know which ones they can take.
- Prepare pamphlets or mimeographed sheets including written instructions about each method choice and an emergency number for clients.
- In the waiting room, keep interesting magazines and articles that highlight topical subjects.

- Develop or order materials for your clients who require special attention, such as visually-impaired people.*

Visual Materials and Models

- Design flip charts that tell the story of the statistics you want to emphasize; they will make the numbers come alive for your audience.

- Have a staff member design a "permanent" flip chart that tells the story of your agency's services. This would be a great aid to take to community functions like the Lions' Club.

- Make your own posters by projecting slides on paper and then tracing and coloring in the lines.

- Organize a poster contest in your agency. Have art supplies available for clients and their guests to work with if there is a long waiting time in your agency.

- Put up attractive, uncluttered bulletin boards in suitable locations with timely information.

- Construct display boxes with compartments to show all of the contraceptive methods. Keep the boxes in the examining rooms and in the waiting area.

- Construct and hang a decorative mobile on a single theme, such as the symptoms of pregnancy.

Audio-Visual Materials

- Introduce your films by describing briefly what each is about, and making suggestions as to what the clients should look for when they watch the film.

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* Library of Congress has an information and referral service on volunteer groups across the country who can transcribe your materials into special media such as Braille, audio cassettes, or extra-large type. Write the National Library Service for the Blind and Physically Handicapped, Library of Congress, First St., S.E., Washington, D.C. 20542.

- Include time for discussion when you plan to show a film.

- Be familiar with the operation of all your equipment, maintain it in running order, and don't leave damaged equipment around.

- Combine your presentation of materials. Hand out pamphlets after a film, or place a poster highlighting the main ideas of a brochure next to the stack of brochures.

- Prepare a "media exhibit" for school fairs or church bazaars.

- Use your staff members' talents in photography to develop a slide show for agency use and for the educators when they make a public appearance.

You may come to the conclusion that all the materials you need cannot be developed in-house and that some will have to be purchased. The following list contains suggestions on what to do before buying new materials:

Printed Materials and Visuals

- Before placing large orders for printed materials, write for samples and look them over carefully; the selection criteria we listed earlier may be helpful in your review.

- Assign one staff person to the task of finding publication lists and writing for samples. This person might either review the materials his/herself or ask fellow agency workers and clients to look over the samples.

- In selecting flip charts and posters, double-check them for durability.

Audio-visuals

- Check to see if the supplier offers a free preview of each film; if not, then rent before buying. It is a good idea to get the opinions of clients and staff over a short period of time in addition to the initial staff review of a film.

- Many audio-visuals are available in a variety of models. Check the equipment you have to see whether the materials you choose are adaptable.
- Consider splicing to update a film's style or content if most of the original version is acceptable.

Identify Resources

HOW CAN I OBTAIN THE NECESSARY RESOURCES?

You should have a good idea of what existing resources can be used to develop or buy new educational materials. For example, is there money in your budget to purchase materials? If so, is it enough to meet the needs you have identified? Will the cost be a one-time expense such as buying a projector, or is it a continuing expense such as printing pamphlets? Will there be costs for maintenance or repair?

If you find that your current budget does not have sufficient funds for the purchase of materials, do you have talented staff members who are willing to help you develop materials? How much staff time will be required? Will their time be recompensed?

There are ways to stretch the available resources and to devise new ones for material development. Perhaps the following suggestions will give you some ideas.

- The bulletins sent to your agency by the National Clearinghouse for Family Planning Information often contain a one-page handout. All you need to do is add the agency address and phone number and then duplicate copies as needed. The Clearinghouse may also provide pamphlets and posters at no cost to programs with limited education budgets.
- The Office for Family Planning and groups such as Planned Parenthood Federation of America and the American Cancer Society produce packets of camera-ready public service advertisements that are free upon request. You could use these ads to illustrate your own agency materials.

- Local health organizations such as the heart and lung associations have free educational materials that you can adapt for your program.

- Continuing education courses in your Region often teach skills for producing materials. Local colleges might also have courses in print or audiovisual production that someone on the staff could take.

- Look to your volunteers--there may be a wealth of writing and artistic talent waiting to be tapped.

- Sponsor and supervise an art or journalism summer intern to produce materials for your program.

- Convince the art instructors in local schools to start a student project based on a family planning theme. Then decorate your agency walls with the resulting artwork.

The agency director may be willing to help you get resources, if you have an education plan that includes clearly stated objectives and an itemized list of required materials with their costs. The next step will help you develop such a plan.

Develop an Action Plan

HOW WILL AN ACTION PLAN SUMMARY HELP?

Any action plan that you devise for the education program should contain information about materials, including such things as: what materials will be acquired or developed; who will be responsible; when the materials will be available; and what the associated costs will be.

You may also find it useful to summarize in another table all of the information on materials from your agency, community, and staff development plans. This summary table can be used for close monitoring of the activities and costs associated with material development and use. There are a variety of possibilities for the format of an action plan summary; the following example is one you might find useful:

Material Type	Why	When	Who	Costs	
(Requested by what department?)	(Related to what program objective?)	Specific time limits	Person responsible	Time	$
			Total:	____	____

Design the Program Evaluation

HOW DO I EVALUATE THE EDUCATIONAL MATERIALS?

As with all aspects of your program, the materials should be evaluated. Do they extend the educational messages you want to convey? Are they carrying these messages beyond the agency walls? (Again, materials going into the community must be consistent with community standards.) Are you satisfied with the materials you have selected? As we suggested earlier, all materials that you use should be reviewed and evaluated by both clients and staff; be sure to document their comments.

Review the Situation

Your evaluation should take the situation into account by considering the following: Was the audience the right size for the presentation? Was there enough time for the clients to see the whole film? Do your pamphlets and brochures end up in the "circular file" on their way out of the agency? Do your staff members feel comfortable with their part in the presentation, and are their reviews favorable?

Is time needed for staff development and can you provide it? What about space--is there a corner for a bulletin board, a display table or rack, and privacy for showing a film without interruption? The answers to questions like these aid in your decisions regarding the appropriateness of the materials.

Look for Effectiveness

Part of judging educational materials is assessing their effectiveness. Your observations, questions after a film, and exit interview are all sound techniques. Look for answers to questions such as the following: Did the materials hold the attention of the audience? Did they impart all of the facts clearly? Did the materials deliver a message that is offensive or distasteful by local standards? Did they contain anything that people perceive as being false? Did members of the target audience find the message meaningful to their own lives?

Your educational materials are more likely to be effective if they are attractive, acceptable, and comprehensible to the audience. We hope that this guidebook will help you design a plan to use materials such as these for the benefit of your program's educational objectives.

NOTES

Planning Checklist

There is no end to planning. The questions "How are we doing?" and "Where are we going?" never stop. The answers to these questions will guide your program design, but planning is worthwhile only if it is translated into action. So if you want your plan to be carried out, review it to be sure you've included the following crucial elements. If you find that all the bases are covered, then the program you've planned has a good chance of succeeding.

General Considerations

DID YOU:

- ☐ Involve key people?
- ☐ Determine how to go about getting your plan accepted?

Define the Problem

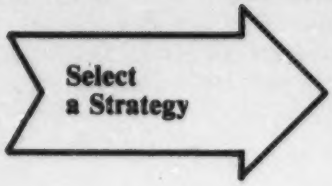
DID YOU:

- ☐ Research the problem?
- ☐ Identify program needs?
- ☐ Write a clear problem statement?

Set the Objective

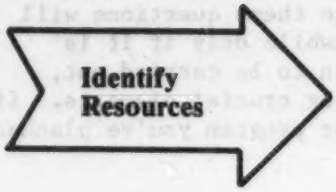
DID YOU:

- ☐ Write a positive, well-defined objective?
- ☐ Define the objective as a situation you expect to happen?
- ☐ Describe results that are realistic and can be measured?



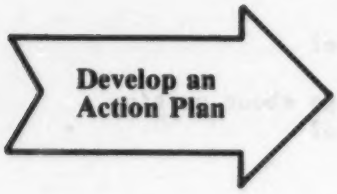
DID YOU:

- ☐ Think of many alternatives?
- ☐ Analyze the feasibility of each strategy?
- ☐ Include staff in choosing a strategy?



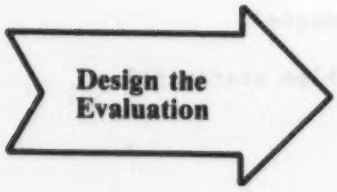
DID YOU:

- ☐ Define exactly what is needed?
- ☐ Assess available resources?
- ☐ Develop additional resources?



DID YOU:

- ☐ Identify the tasks involved in carrying out the strategy?
- ☐ Make a table that indicates deadlines, responsibilities and costs?
- ☐ Prepare a budget?



DID YOU:

- ☐ Define the measures and/or indicators?
- ☐ Collect appropriate data?
- ☐ Develop a monitoring system?
- ☐ Decide on a way to judge the program's success?

☑ = AN A+ EDUCATION PLAN

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